FAMILY PLANNING PROGRAM **SECTION:** Medical Records Administration

POLICY AND PROCEDURE MANUAL **SUBJECT:** Documentation

POLICY: All services provided to clients must be recorded on their medical record.

PROCEDURE:

1. All client contacts (clinic visits, telephone conversations, and written communications) must be recorded in client's medical record.

2. Entries must be legible.

3. Each page in the medical record must contain sufficient information to identify the client.

4. All entries must be dated and signed or initialed by caregiver:

   a. date must be complete with year, month, day
   b. title of caregiver must be indicated.

5. All spaces must be filled in.

   a. if an item is not applicable, so indicate
   b. lines must be drawn through empty spaces.

6. Descriptive narrative must be added where needed.

7. Document follow-through for client's complaints and/or abnormal screenings or test results.

   a. list problems on problem list
   b. use SOAP (subjective, objective, assessment, plan) charting on progress sheet.

8. Document responses to contraceptive method and/or treatment.

9. Charting errors must be noted by drawing a single line through the error, initialing and dating it. May indicate reason by writing "mistaken entry."

10. Agencies must follow Stedman's abbreviations publication. If additional abbreviations are used, a list must be maintained by the agency and reviewed by staff upon hiring and on a regular basis.

FAMILY PLANNING PROGRAM SECTION: Medical Records Administration

POLICY AND PROCEDURE MANUAL **SUBJECT:** Documentation

11. Entries must never be obliterated in any way.

   a. do not erase
   b. do not use white out.

12. Do not place "sticky note" in chart containing information that is to become a permanent part of the medical record.

13. Fax sheets will fade in time. Make a copy if they are to become part of the permanent record.

14. Agencies should develop policies on how to make a late entry into a medical record.

15. Records should be checked for completeness prior to filing.

16. All medical records forms and test results forms shall be attached to the medical record. There shall be no loose pages inserted in the medical record.

Reference:

1. Program Guidelines for Project Grants for Family Planning Services, January 2001, p. 28-29, Section 10.3, Medical Records.